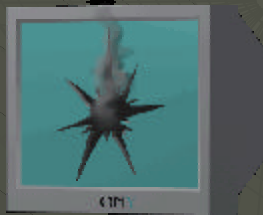


IT Project Status Reporting

What Does It Include and How Do I Report It?



ENTER

SUBMIT

CLEAR

HOME

W E B

1. Why Report on Project Status?

- ◆ To provide regular feedback on progress
- ◆ To provide information on the management issues
- ◆ To secure approval/endorsement of any decisions/directions made in the report
- ◆ To control additional work (functionality) or scope creep
- ◆ To meet State CIO reporting requirements for certain IT projects (size, cost, complexity, criticality)

Second Standish Group Study in 2001

- ◆ Time overruns significantly decreased to 63% compared to 222%
- ◆ Cost overruns were down to 45% compared to 189%
- ◆ Required features and functions were up to 67% compared to 61%
- ◆ 78,000 U.S. projects were successful compared to 28,000
- ◆ 28% of IT projects succeeded compared to 16.2%



Why the Improvements?

- ◆ The average cost of a project has been more than cut in half.
- ◆ Better tools have been created to monitor and control progress and
- ◆ Better skilled project managers with better management processes are being used.
- ◆ The fact that there are processes is significant in itself."



The Standish Group, "CHAOS 2001: A Recipe for Success" (2001)

Chaos 2004...Standish Group

- ◆ 53% IT Project are challenged (late, over budget or less than the required features and functions)
- ◆ 29% IT Projects succeeded (compared to 16%)
- ◆ 18% IT Projects failed. (compared to 31%)



What Should We Learn From This?


◆ "There is no education in the second kick of a mule."

◆ *Sam Rayburn (1882-1961)*

◆ *Former Speaker of the U. S. House of Representatives*

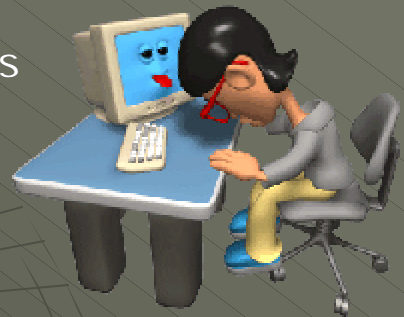


Top Ten Ways to Guarantee IT Project Failure

- 
1. Don't use a specific methodology because ***** is all that is really important.
 2. Create the project plan by working backwards from a drop-dead system completion date.
 3. Don't bother with a data or prototype model. Just go ahead and build whatever you need.
 4. Use a Technical Lead that has never built a similar system. Hiring such talent is too expensive.
 5. Hire forty developers to make the coding go faster.
 6. Build the system in what we know, the development team thinks that "home grown" is better than COTS.
 7. Three months before the system goes live, assign one junior developer to handle the data migration.
 9. Change the system to support critical new requirements discovered during final development.
 10. Buy a commercial, off-the-shelf package and customize it ... a lot.

What Does a “Troubled Project” Look Like?

- ◆ Missed Deadlines
- ◆ Increased Budgets
- ◆ Dissatisfaction Within the Ranks
- ◆ Missed Milestones
- ◆ Critical Path Delays
- ◆ Sub-standard Project Team Performance
- ◆ Sub-standard Deliverable Performance
- ◆ Untimely problem and issue resolution
- ◆ Unmanaged risks



Why is This Project in Trouble?

- ◆ The Project does not meet project selection criteria
- ◆ Project goals were not sufficiently defined
- ◆ Project scope was not sufficiently defined
- ◆ Project requirements were not sufficiently defined
- ◆ Project deliverables were not sufficiently defined
- ◆ Project team lacks the skills to complete this project
- ◆ Project team is too large
- ◆ Project team is too small
- ◆ Project team is poorly organized
- ◆ Project team is hampered by personal conflicts or internal politics



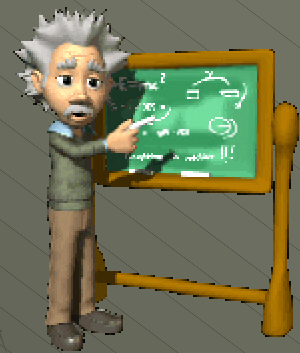
Why is This Project in Trouble? (cont.)

- ◆ Project is insufficiently funded
- ◆ Project schedule is overly aggressive
- ◆ Lack of visible management support for the project
- ◆ Equipment delays have hampered project schedule
- ◆ Project communication has been ineffective
- ◆ Project management process has been too lax
- ◆ Project management has been too cumbersome
- ◆ Business needs and circumstances have changed
- ◆ Technical needs and circumstances have changed



2. “Dashboard” Processes

- ◆ Only applies to Major and Multi-agency/Enterprise Projects
- ◆ Periodic (probably monthly) reports to the State PMO
- ◆ Red, green and yellow status reporting
- ◆ Projects assigned to project managers with the State PMO who can assist agency project managers



Defining Vital Signs and Threshold Values

Vital Signs

The Center for Project Management's Vital Signs are the most effective method for measuring a project's status. Vital Signs utilize a point system, the higher the point value the more serious a problem. By the Sponsor and Project Manager agreeing to the Vital Signs as well as thresholds for healthy, caution, and danger conditions, the project can be effectively monitored. The Vital Signs, their variances, and point system indicated here, are used by organizations that have adopted the Center for Project Management's Vital Sign system.

Vital Signs

Schedule: actual vs. plan % difference in days
Milestone: actual vs. plan % goals completed on time
Deliverable: actual vs. plan % goals achieved
Unresolved Issues # of issues vs. # of deliverables
Cost to Date: actual vs. estimated % over or under budget
Resources: actual vs. planned % difference in staff, equip., etc.
High Probability, High Impact Risk Events i.e. loss of budget, loss of Sponsor, change in corporate strategy
Disposition of the team (items not listed here)
Sponsor's commitment and time (items not listed here)

Variance

< 10%
10% to 20%
> 20%
< 10%
10% to 20%
> 20%
< 10%
10% to 20%
> 20%
No issues
< Deliverables
> Deliverables
< 10%
10% to 20%
> 20%
< 10%
10% to 15%
> 15%
1 - 3 Risks
4 - 5 Risks
6 - 7 Risks
All items > 3
1-2 items < 4
3 or more < 3
All items > 3
1-2 items < 3
3 or more < 3

Points

0
1
2
0
1
2
0
2
4
0
1
2
4
0
2
4
1
3
5
0
2
4
0
3
6

Vital Signs Report Card

Healthy = (1 - 8 Points)
Variances are acceptable and the project is in good shape.

Caution = (9 - 15 Points)
This project is in trouble and is beyond the Project Manager's sole ability to recover. The Sponsor's involvement is crucial if recovery is warranted.

Danger = (16+ Points)
The project is a runaway and beyond the Sponsor's ability to recover. The steering committee must intervene and either shut the project down or implement a recovery plan.

Vital Signs	Variance	Points
Schedule: actual vs. plan % difference in days	< 10% 10% to 20% > 20%	0 1 2
Milestone: actual vs. plan % goals completed on time	< 10% 10% to 20% > 20%	0 1 2
Deliverable: actual vs. plan % goals achieved	< 10% 10% to 20% > 20%	0 2 4
Unresolved Issues # of issues vs. # of deliverables	No issues < Deliverables > Deliverables	0 1 2
Cost to Date: actual vs. estimated % over or under budget	< 10% 10% to 20% > 20%	0 1 2
Resources: actual vs. planned % difference in staff, equip., etc.	< 10% 10% to 15% > 15%	0 2 4
High Probability, High Impact Risk Events i.e. loss of budget, loss of Sponsor, change in corporate strategy	1 - 3 Risks 4 - 5 Risks 6 - 7 Risks	1 3 5
Disposition of the team (items not listed here)	All items 1-2 items 3 or more	0 2 4
Sponsor's commitment and time (items not listed here)	All items 1-2 items 3 or more	0 3 6

Disposition of the Team

- ◆ Excellent professional, technical competence
- ◆ Good interpersonal skills
- ◆ Sharing, giving tendency
- ◆ Respects authority
- ◆ Cares for the customer
- ◆ Self-reliant, positive, happy
- ◆ Welcomes feedback
- ◆ Finger on the pulse
- ◆ Delivers on commitments
- ◆ Integrity, honesty, trust

The Project Sponsor

- ◆ The project sponsor is responsible for connecting the various perspectives across the organization---
- ◆ Enrolling other executives in the vision
- ◆ Keeping the day to day tactical efforts of the project aligned with the strategic objectives
- ◆ Ensuring compliance with policy, laws, regulations, etc
- ◆ **Helping PM generate-buy-in among the end user community**

Vital Signs Report Card

Healthy = (1 - 8 Points)

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This project is in trouble and is beyond the Project Manager's sole ability to recover. The Sponsor's involvement is crucial if recovery is warranted.

Danger = (16+ Points)

The project is a runaway and beyond the Sponsor's ability to recover. The steering committee must intervene and either shut the project down or implement a recovery plan.

PROJECT STATUS REPORT

Project Name: _____

Prepared by: _____

Date MM/YYYY: _____

Reporting Period: _____

Create links to referenced documents (e.g., [Link_To_...](#)) by using Insert → Hyperlink on your toolbar.

1

1. Executive Summary

Overall Status:

	Green ¹ (Healthy with Control)	Yellow ² (Caution)	Red ³ (Danger or Critical)	Reason for Deviation
Budget:	1 1	1 1	1 1	_____
Schedule:	1 1	1 1	1 1	_____
Scope:	1 1	1 1	1 1	_____
Quality:	1 1	1 1	1 1	_____

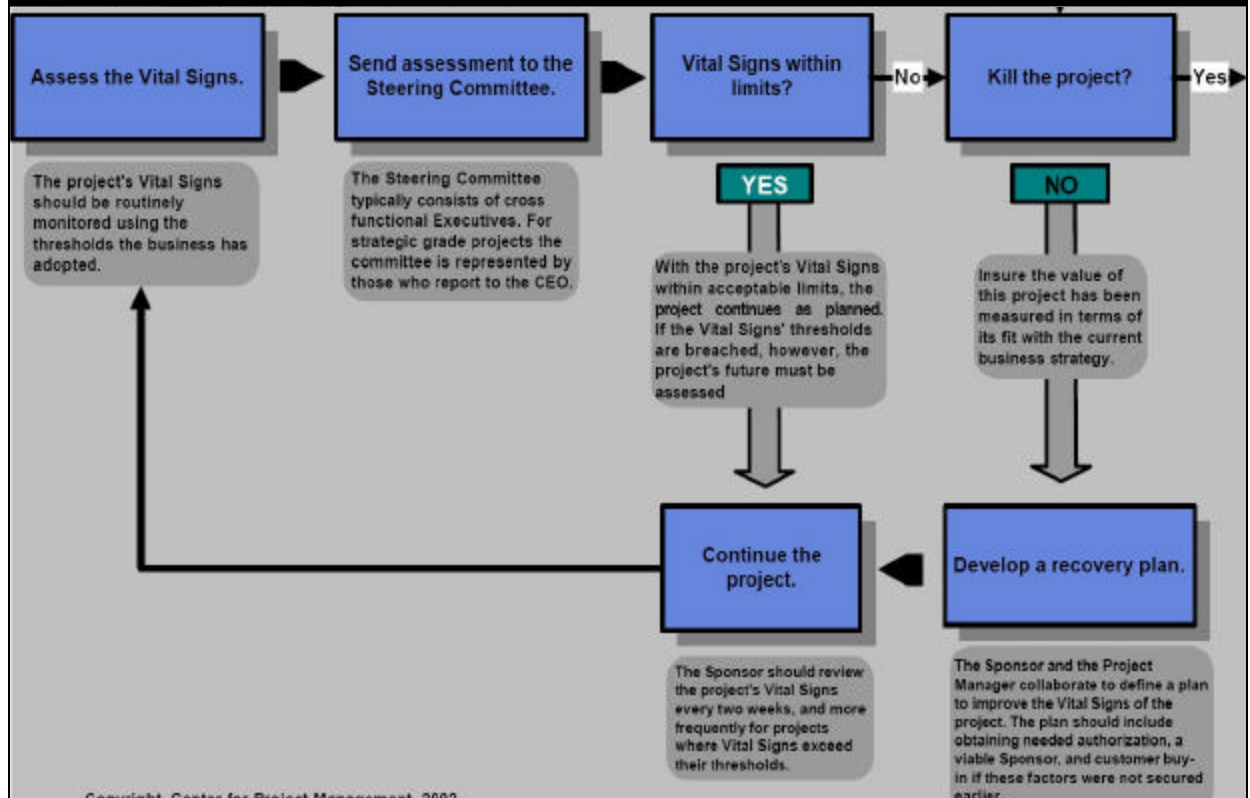
¹ Project is within budget, scope and on schedule.

² Project has deviated slightly from the plan.

³ Project has fallen significantly behind schedule, is forecast to be significantly over budget, or has taken on tasks that are out of scope.

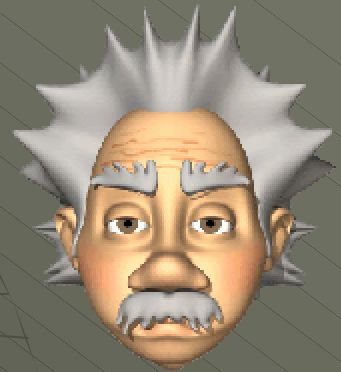
Comments: _____

3. Assessment of Vital Signs



“Troubled” Projects

- ◆ Based on “Dashboard” indicators
- ◆ PMO meets with agency’s project manager to determine scope of problem
- ◆ Constructs a “rescue” plan for the project
- ◆ Require use of an Independent Verification and Validation (IV&V) contractor
- ◆ Assist in termination of project, if necessary

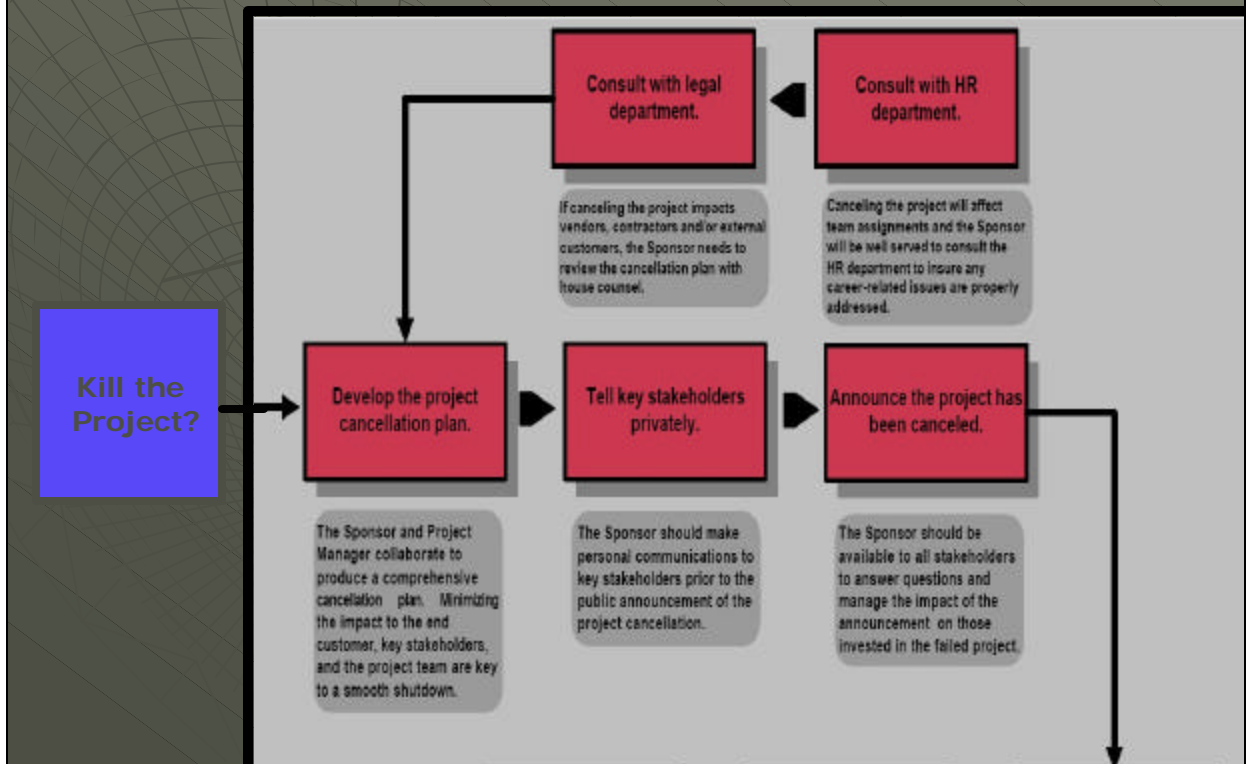


4. Salvage Strategies

- ◆ Reworking project plans to modify tasks and resource assignments.
- ◆ Reducing project scope to limit problem areas and focus on potential successes
- ◆ Revising project deliverables to alleviate problems
- ◆ Re-organize the project team
- ◆ Add additional resources to the project team
- ◆ Lengthen the project schedule
- ◆ Increase the project budget
- ◆ Request additional management support
- ◆ Other strategies
- ◆ Evaluate likelihood of salvage strategy success
- ◆ Consider cancellation as an option



4. Project Cancellation Process



5. Project Cancellation Process (cont.)

Announce the Project
Has Been Cancelled

Re-assign project team
members.

Project team members should be re-assigned to new projects or given new responsibilities.

Gather lessons learned
from the project.

Team members from the IT and business side should be interviewed regarding their experience and perspective about the project. Themes and lessons should be summarized and recorded for future use.

Salvage usable project
components.

All projects have reusable components such as requirements, design, test data, and certain estimates which can be salvaged and reused on future projects. The Sponsor should direct a plan to recover these components.

Copyright, Center for Project Management, 2002

Project Cancellation

- ◆ Have well-defined project vital signs and threshold values
- ◆ Assess vital signs regularly
- ◆ Prepare a recovery plan, if appropriate
- ◆ Monitor vital signs regularly
- ◆ Prepare a cancellation plan
 - Sponsor
 - Human Resources
 - Legal
- ◆ Inform stakeholders
- ◆ Announce cancellation
- ◆ Salvage reusable components
- ◆ Note lessons learned
- ◆ Reassign resources



Strategies for IT Project Success

1. Don't cut corners, methodologically. In the long run, this results in system failure or an inadequate system that doesn't meet the users' needs.

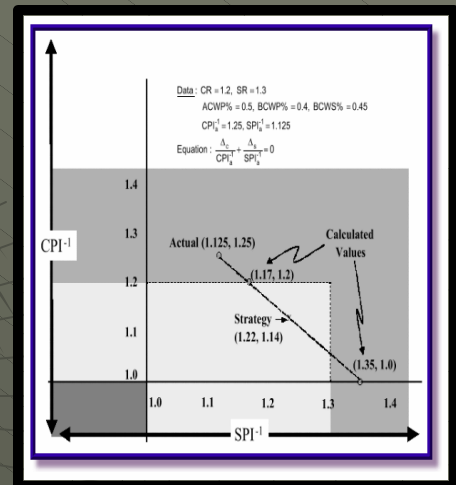
2. Audit each major deliverable and step along the way for accuracy and correctness.

3. Carefully monitor top management support for the project. Make sure that managers are aware of the progress of the team.

4. Secure the correct technical lead for the project.

5. Use the right "tools" for the job.

6. Develop and Monitor Project Vital Signs



Project Assessment Tools

- ◆ [Troubled Project Assessment](#)
- ◆ [Monthly Status Report](#)

Project Manager's Calendar

Neg	Fri	Fri	Fri	Thu	Wed	Tues
8	7	6	5	4	3	2
16	15	14	12	11	10	9
23	22	21	20	19	18	17
32	30	28	27	26	25	24
39	38	37	36	35	34	33